



Missouri Travel Barometer
November 2016 Report
(Data available as of 12/15/16)

The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry with a monthly *Missouri Travel Barometer*. Updated monthly, the barometer shows key travel indicators that - at a glance - illustrate various measurements that affect Missouri's tourism industry and are indicators of its health.

November Report Highlights

Lodging Statistics: 2016 Calendar Year to Date through October

According to Smith Travel Research, Missouri's statewide lodging demand, occupancy and revenue have shown positive growth compared to the same time period last year. When compared to our surrounding, competitive states, Missouri has shown stronger growth in Occupancy, Demand and RevPAR while other states are showing stronger growth in ADR.

Missouri Lodging:

Demand up 2.6% -- Occupancy up 2.9% -- ADR up 2.6% -- RevPAR up 5.6%

SIC Tourism business sales and tax collections: 2016 Calendar Year to Date through September

- For FY17, a 1.2% (\$39.3 million) sales revenue increase is indicated by preliminary reports on 17 SICs for July-Sept
- For CYTD16, a 3.2% (\$303.3 million) sales revenue increase is indicated by preliminary reports on 17 SICs for Jan-Sept
- September 2016 saw a 0.81% (\$9.2 million) sales revenue increase compared to September 2015

Website Visits: 2016 Calendar Year to Date through November

- Total web visits (main site and mobile visits) were up 16.6% for November 2016 compared to November 2015
- Desktop visits increased 39.3% while mobile visits declined 13.4% during November 2016 compared to 2015
- Total web visits (main site and mobile visits) were up 1.9% for January-November 2016 compared to last year

Responses to MDT advertising (requests for travel guide via phone, website, email, etc. or sign up for a newsletter that is emailed based on travel interests): 2016 Calendar Year to Date through November

- 149,928 responses for 2016 YTD – a decrease of 11.4%
- Base markets currently show the strongest growth – up 4.5% for Jan-Nov 2016 compared to the same period in 2015
- DMAs with the strongest growth in responses are Jackson, TN 54%, Oklahoma City 43%, Tulsa 38%, Evansville 19%

Welcome Center visits: 2016 Calendar Year to date through November

- For CYTD 2016 the centers are up 10.1% for January-November 2016 compared to the same period in 2015
- For the month of November alone, the centers were up 13.4% compared to November 2015

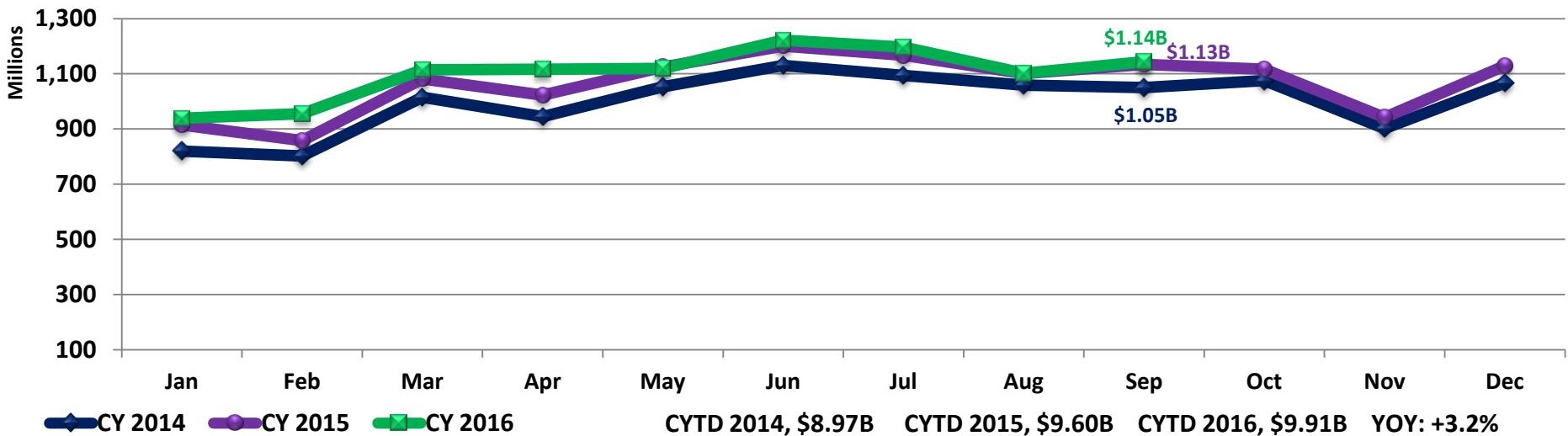
Commercial airport deplanements: 2016 Calendar Year to Date

- Kansas City up 5.2% for January-October 2016 compared to the same period in 2015
- Springfield up 2.4% for January-September 2016 compared to the same period in 2015
- All airports up 7.3% for January-September 2016 compared to the same period in 2015

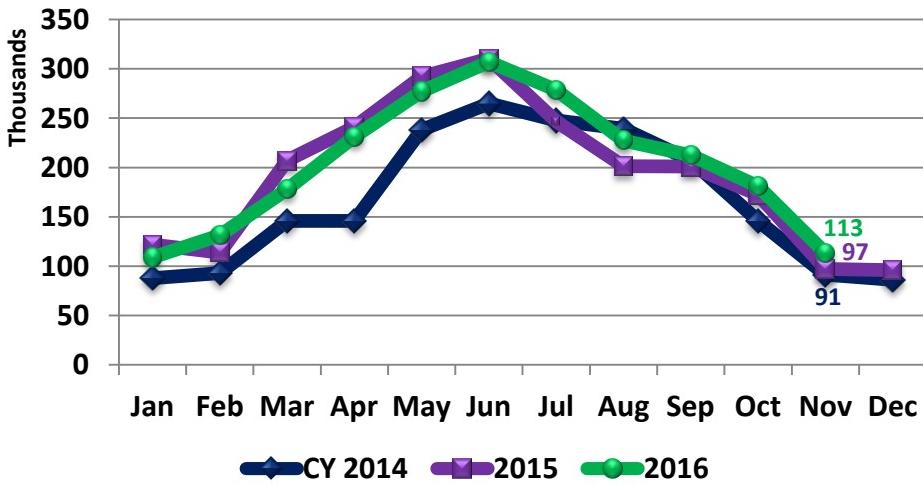
Brand USA Partners on VisitTheUSA.com: Website Activity 2016 Calendar Year to Date through November

- Missouri's homepage on VisitTheUSA.com had 14,102 page views from Jan-Nov 2016 (531 during November)
- Top five countries viewing Missouri's page during November were Japan, Brazil, France, and Germany
- Trip Ideas links received 944 clicks during January-November 2016
- Missouri's City Partners had 19,963 page views during January-November 2016

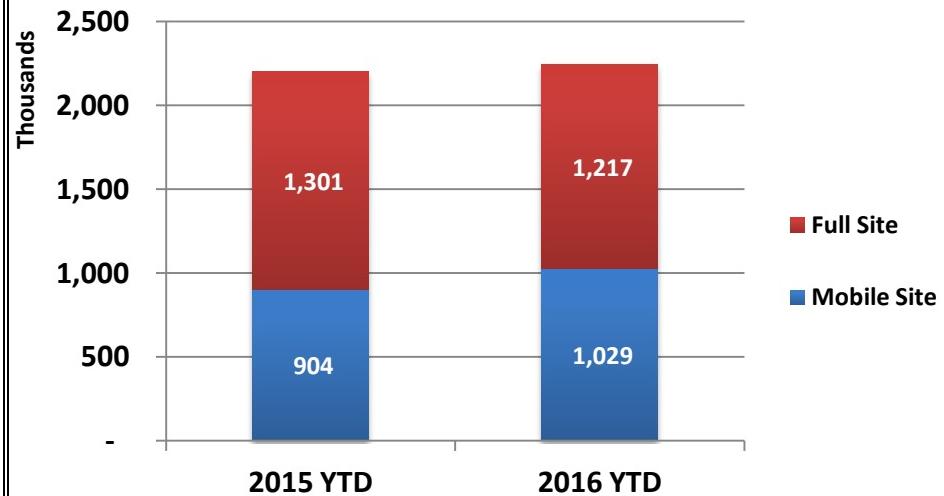
Sales Revenue from 17 Tourism SICs



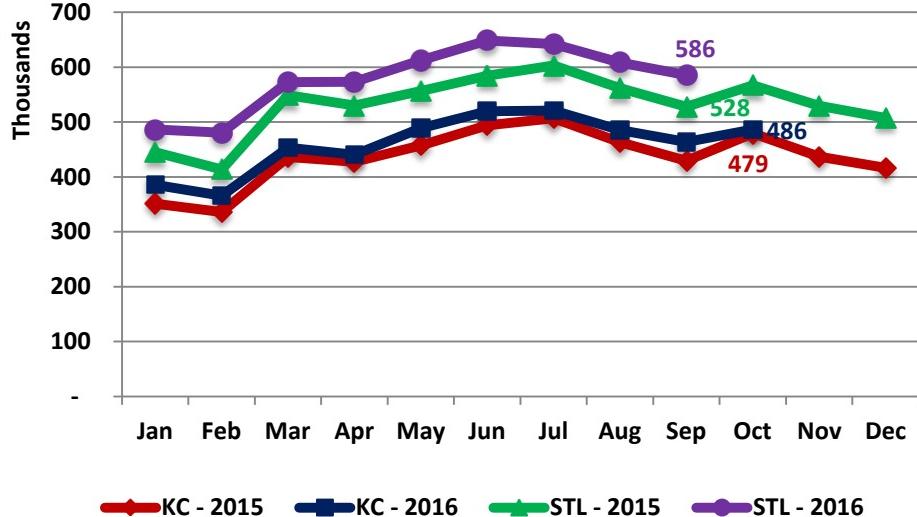
Visits to VisitMO (Full & Mobile Sites) by Month



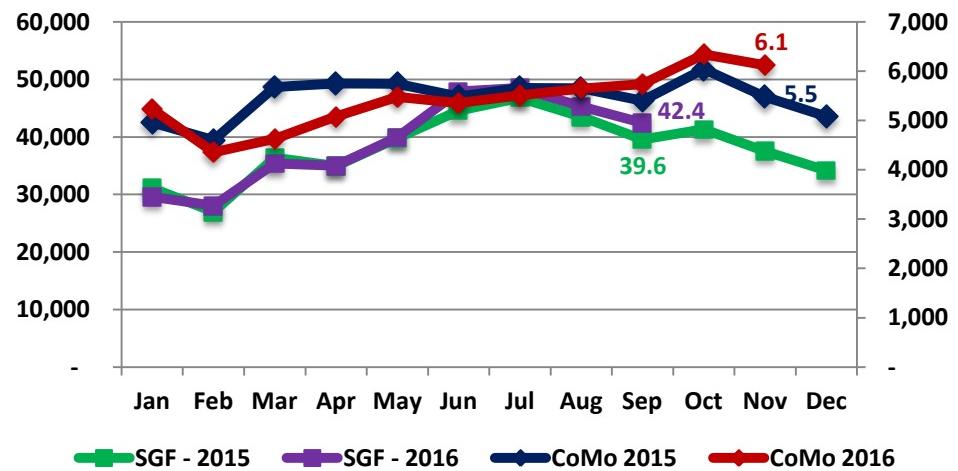
YTD Visits to VisitMO by Site



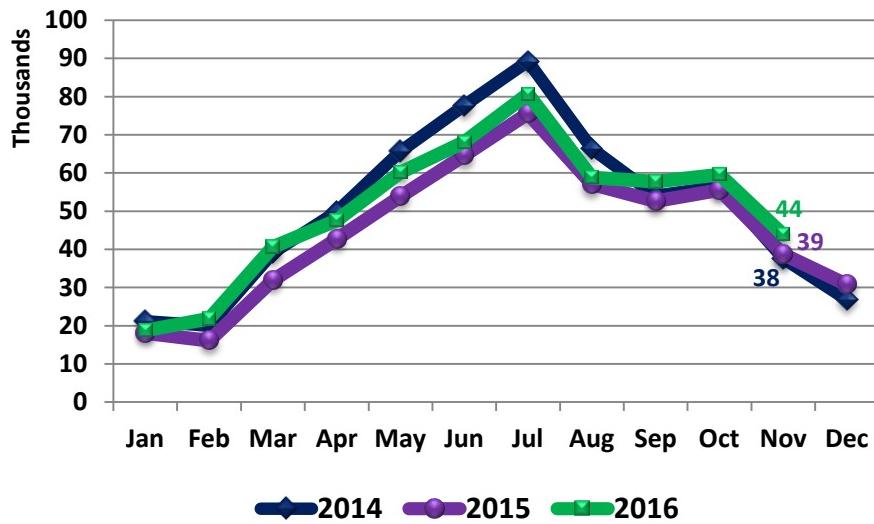
KC & STL Airport Deplanements



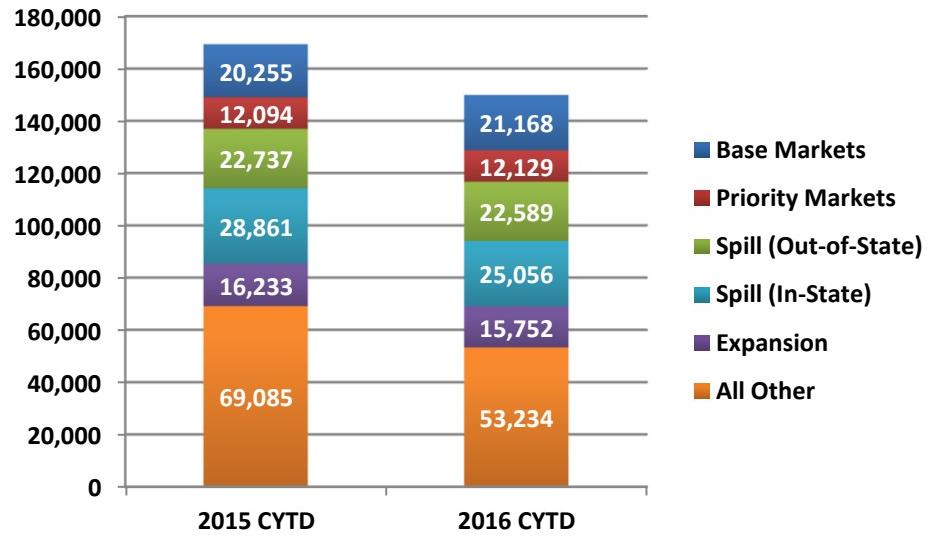
Columbia (R) & Springfield (L) Airport Deplanements



Welcome Center Visitors



Responses to MDT Advertising



MDT MONTHLY RECAP: TOPLINE NUMBERS

NOVEMBER REPORT

Quarterly Sales (Source: 17 SIC Codes from MO Dept. of Revenue)					
	FY 2015*	FY 2016	% Change FY16 Over FY15	FY 2017	% Change FY17 Over FY16
Jul-Sep	\$3,202,717,139	\$3,402,476,568	6.2%	\$3,441,736,410	1.2%
Oct-Dec	\$3,043,798,760	\$3,188,529,443	4.8%		
Jan-March	\$2,853,760,668	\$3,009,046,102	5.4%		
Apr-June	\$3,348,563,559	\$3,457,270,585	3.2%		
FY Total	\$12,448,840,126	\$13,057,322,698	4.9%		
	CYTD 2015	CYTD 2016			
Jan - Sep	\$9,604,800,795	\$9,908,053,097	+3.2%		

*Figures for FY15 are the final SIC sales that will be used in MDT's funding formula.

2016 Nov YTD Responses (Source: Ruf Strategic Solutions)			2016 Nov YTD Web Stats (Source: Google Analytics)	
	CY15	CY16	% Change	
Base Markets	20,255	21,168	+4.5%	November Web Visits
Priority Markets	12,094	12,129	+0.3%	% of change
Spill (Out-of-State)	22,737	22,589	-0.7%	
Spill (In-State)	28,861	25,056	-13.2%	YTD Combined Visits
Expansion Markets	16,233	15,752	-3.0%	% of change
All Other	69,085	53,234	-22.9%	
TOTALS	169,265	149,928	-11.4%	

2016 YTD through October Missouri Lodging Stats (Source: Smith Travel Research/STR)				
	Occupancy	ADR	RevPAR	Demand
October	63.0%	\$96.32	\$60.70	n/a
YTD % of Change	+2.9%	+2.6%	+5.6%	+2.6%

2016 November YTD Missouri Welcome Center Visitors (Source: MDT)			
	CY 2015	CY 2016	
November	38,680	43,852	
YTD TOTALS	506,576	557,651	

Airport Deplanements			
	CY 2015	CY 2016	% of Change
Cape Girardeau (Jan-Sep)	3,900	3,455	-11.4%
Columbia (Jan-Nov)	60,466	59,497	-1.6%
Ft Leonard Wood (Jan-Sep)	5,499	5,445	-1.0%
Joplin (Jan-Sep)	21,731	21,870	+0.6%
Kansas City (Jan-Oct)	4,381,742	4,610,870	+5.2%
Kirksville (Jan-Sep)	3,749	3,465	-7.6%
Springfield (Jan-Sep)	343,607	352,020	+2.4%
St. Louis (Jan-Sep)	4,771,066	5,210,376	+9.2%